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Hungary Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Hungary Facility Management Market size is estimated at USD 3.58 billion in 2025, and is expected to reach USD 4.36 billion by 2030, at a CAGR of 4.04% during the forecast period (2025-2030).

Key Highlights
- Hungary has one of the most advanced markets for facility management services, with the sector based on integrated contracts provided by major vendors across continents and borders. Meanwhile, small local competitors focus on single contracts and single-service solutions. Additionally, there are increasing opportunities to use facility management and corporate real estate in innovative ways.
- Over the last decade, many service providers operating in the country have prioritized expanding their presence to profit from the growing demand for facility management, particularly with the current trend favoring the outsourcing of non-core activities. Given the opportunities, the country has seen an increase in the number of possibilities to leverage facility management and corporate real estate in innovative ways.
- The medical technology sector is one of Hungary's most historic economic sectors, with over 100 years of well-recognized innovation, highly specialized technological development, and significant exports to the worldwide market. Some Hungarian enterprises with cutting-edge technology and products have acquired international prominence. An increasing number of creative local SMEs and some multinational medtech manufacturers are taking advantage of Hungary's favorable environment and productive workers. Nearly 150 enterprises in Hungary are involved in export-driven medical manufacturing.
- Facility management involves maintaining an organization's most important and valuable assets, such as real estate, machinery, buildings, and other settings that house workers, output, inventory, and other operational components, contributing to the business's bottom line.
- The substantial outsourcing operations conducted by government organizations in the market have resulted in public sector

saturation. Public sector organizations have utilized contract extensions to retain long-term partnerships with facility management players. However, increasing market rivalry has affected the profit margins and growth of current providers. The intense competition among vendors has commoditized FM services in the country, which is expected to challenge the market's growth.
- The pandemic had a tremendous impact on the facilities management industry, resulting in a substantial shift in the operations, strategies, and functions of facility managers inside organizations. In the post-COVID-19 future, there is an increased demand for transformation, creative solutions, and unique planning strategies. Since the emphasis has shifted toward higher hygiene-related rules, better workplace safety and cleanliness, and the development of a digitized work environment, sourcing and procurement play an essential role in the post-COVID-19 transformation, recovery, and restart of the facilities management industry.

Hungary Facility Management Market Trends

Hard FM is Expected to Hold Significant Market Share

- Hard facility management services encompass the maintenance and management of a building's physical assets, including its HVAC, electrical, and plumbing systems, as well as its overall structure. These services are crucial for ensuring the smooth operation of the facility and the safety and comfort of its occupants.
- According to the Hungarian Central Statistical Office, in 2022, in Hungary, the export of business services accounted for the largest share of the country's total export value of services, amounting to approximately EUR 13 billion (USD 14.15 billion). The country's growing focus on sustainability has resulted in a rising trend toward green and energy-efficient buildings. As a result, building owners are increasingly seeking out energy-efficient solutions, leading to heightened demand for related hard facility management services, such as energy management.
- In September 2022, Budapest's city leadership introduced measures to reduce energy consumption and costs for operating public services while increasing the security of the city's energy supply. This included the implementation of the First Energy Package framework, which mandates that buildings belonging to the municipality cannot be cooled below 25C or heated above 21C during the winter. Such initiatives are expected to drive the adoption of energy-efficient solutions in commercial and industrial settings, further fueling the demand for hard FM services.
- The public and private sectors in Hungary are also investing heavily in the conversion of existing buildings into smart buildings, incorporating advanced access controls, sophisticated security management systems, and renewable energy sources, among other innovations. For example, the country's Modern Cities Program allocated funds worth USD 343 million to develop energy systems and public utilities in eight cities.
- The maintenance and management of smart buildings, with their advanced building systems, will require regular attention, creating a significant demand for hard facility management services in areas such as HVAC, lighting, security, access control, and energy management systems. With the continued growth of smart buildings, the demand for these services is expected to increase in the coming days.

Industrial Segment to Witness Significant Growth

- The industrial sector encompasses a wide range of applications, including manufacturing in sectors such as food & beverage, electronics, and automotive, as well as mining and oil and gas. As a result of government projects, reduced taxes, and business-friendly legislation encouraging automation and the progress of the manufacturing sector, the demand for facility management services in the industrial sector has increased significantly.
- According to Cushman & Wakefield's annual Manufacturing Risk Index (MRI) assessment in 2022, Hungary dominated the world rankings based on parameters such as operational costs, labor, and economic and political risks. With a ranking of 11th out of 45

nations with the greatest industrial environment in the world, Hungary is well-positioned to benefit further.
- It has a more extensive transportation infrastructure than its key Central and Eastern European competitors and one of the lowest labor costs in the region. Additionally, Hungary has a comparative advantage over Poland in terms of quality and trained labor, over the Czech Republic in terms of rental prices, and over Slovakia in terms of pricing advantages in local currency. As a result, Hungary provides various options for renters, landlords/developers, and agencies.
- Currently, more than 600,000 square meters of logistical space are under development in Hungary, with the majority of it situated in the Greater Budapest region. The eastern and southern submarkets are seeing the most development, while development activity in regional markets is more modest, with approximately 136,000 sq m currently under development, 44% of which has been placed on pre-lease.
- Miskolc, Kecskemet, and Tatabanya are the focus of development. HelloParks is the most active developer concentrating on the Greater Budapest area, followed by CTP and VGP. The most prominent developers in the regional marketplaces are InfoGroup and Cordys Capital, while the newest companies in the logistics development business include Biggeorge, Faedra Group, and White Star.
- As a result of major developments, including growing investment in the manufacturing sector and the rising number of manufacturing facilities, contracts for facility management services in the sector are expected to increase significantly.

Hungary Facility Management Industry Overview

The facility management market in Hungary is fragmented, with major players such as CBRE Group, Apleona GmbH, ISS Global, Jones Lang LaSalle IP Inc., and Group Atalian. These players are adopting various strategies, including partnerships and acquisitions, to improve their product offerings and gain a sustainable competitive advantage.

In October 2023, Apleona acquired a majority stake in the Irish specialist for predictive maintenance and repair, and the technology specialist advises its customers on condition-based and predictive maintenance and repair solutions for building technology systems such as HVAC devices, compressors, chillers, or pumps.

In September 2023, CBRE Group announced a partnership with Emitwise, a leading carbon accounting software provider, to collect greenhouse gas emissions (GHG) data from its supply chain and provide carbon accounting capabilities to its suppliers.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION
1.1 Study Assumptions and Market Definition
1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS
4.1 Market Overview
4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Bargaining Power of Suppliers
4.2.2 Bargaining Power of Consumers
4.2.3 Threat of New Entrants
4.2.4 Threat of Substitute Products
4.2.5 Intensity of Competitive Rivalry
4.3 Impact of COVID-19 on the Facility Management Industry

5 MARKET DYNAMICS
5.1 Market Drivers
5.1.1 Increasing Investments in Healthcare Infrastructure and the Construction of Healthcare Facilities in the Hungary
5.1.2 Renewed Emphasis on Workplace Optimization and Productivity
5.2 Market Restraints
5.2.1 Diminishing Profit Margins and Ongoing Changes in Macro-environment

6 MARKET SEGMENTATION
6.1 By Type of Facility Management
6.1.1 In-house Facility Management
6.1.2 Outsourced Facility Mangement
6.1.2.1 Single FM
6.1.2.2 Bundled FM
6.1.2.3 Integrated FM
6.2 By Offerings
6.2.1 Hard FM
6.2.2 Soft FM
6.3 By End User
6.3.1 Commercial
6.3.2 Institutional
6.3.3 Public/Infrastructure
6.3.4 Industrial
6.3.5 Other End-Users

7 COMPETITIVE LANDSCAPE
7.1 Company Profiles
7.1.1 CBRE Group
7.1.2 Apleona GmbH
7.1.3 ISS Global
7.1.4 Jones Lang LaSalle IP Inc.
7.1.5 Group Atalian
7.1.6 Sodexo Facilities Management Services (Sodexo Group)
7.1.7 Compass Group PLC
7.1.8 Vinci Facilities Limited (Vinci SA)
7.1.9 Future FM Zrt.
7.1.10 Leadec Kft.

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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